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The purpose of this project was to create training for an oral history cohort and work with Down Home NC to figure out how to create a backend process of storing and sharing these oral histories with others and also dealing with legal issues within that come with the process. Down Home is a community organization that primarily works with rural populations. Rural populations have historically had less access to political and educational resources. Down Home uses storytelling to build community and wants to create an archive for saving some of these stories. We developed a comprehensive guide that gives step-by-step instructions on how to start an oral history archive with limited resources.

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COMMUNITY ORAL HISTORY WITH DOWN HOME NC

by

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Introduction

I am working with Down Home NC, a nonprofit organization with both c(3) and c(4) designations, that focuses on rural communities and trying to improve conditions for the area's inhabitants. Down Home bases their methods around storytelling to build community and change, with a focus on building rural power. According to their website, they state their vision as the following:

> "We unite to build the power and raise the voices of working people in small-town and rural North Carolina in order to take action on the issues that matter to us. By weaving together our different experiences, we can shape a democracy that serves working people, where our labor is valued, and our food, water, and land are healthy."

Down Home was excited by the possibility of creating a repository and creating a format to house and share their stories. The community organization required guidance largely on the process of collecting stories legally and managing the backend of these processes, such as, ingesting materials, creating a schema for the oral histories, procedures for tagging, etc.

To that end, I created training for an oral history cohort and worked with Down Home to figure out how to create a backend process for storing and sharing these oral histories with others-- that is manageable by a community-based organization--while also managing the legal issues (such as consent forms) that come with the process.

The goal of this project is to:

- Create a training guide for Down Home to train members to conduct oral histories to support an oral history program.
- Create a series of guidelines to share with the public who wish to submit their own oral histories to community-based organizations with oral history programs.
- Create a consent form that Down Home has permission to use for the purpose of collecting oral histories.
- Design a backend system for Down Home staff to collect, process, and share the oral histories they gather.
- Guide Down Home toward resources that would allow them to create a front-end for the system that is user-friendly and accessible to their members and the public.

While this guide was specifically created for Down Home North Carolina, it is intended to be generalizable to community-based organizations of a similar size and with access to similar resources. Through this process, I committed to assembling a training guide for a community-based oral history project, as well as providing continued support throughout the implementation of the program. A copy of the actual guidelines and training guide will be submitted to the Carolina Digital Repository. The most up-to-date copy can be obtained by contacting me at aramissanchez0603@gmail.com.

Rationale

As a grassroots community-based organization with member-led chapters, Down Home places significant value in individual people and what they can contribute towards building a better world. This means that membership extends through a diverse people, with diverse politics, experiences, and identities. Down Home believes that by sharing stories and creating connections between neighbors, we can collectively work to heal some of the pain and hurt that exists in our communities across our varied differences. Focus points for programming and outreach include healthcare access, addressing the opioid crisis, and community aid programs to assist those who are struggling, a program expanded during the COVID-19 pandemic.

I consider this work incredibly important due to the lack of attention usually afforded towards rural areas, particularly in North Carolina. As a multi-racial organization, Down Home has committed as an organization to build community and debunk common narratives about the rural South that erase the lived experience of Black, Indigenous, Latinx, and Asian people in these areas, while also challenging elitist narratives about rural working-class people. By documenting and recording the experiences of people of color and working-class people in these areas, we can help prevent the erasure of diverse rural identities. While this is not a topic that has garnered mainstream academic interest, there has been significant interest in the media and among

the public. PBS's Black in Appalachia project is one such project that focuses on Black people in rural areas (*Black in Appalachia: Histories of the mountain south*). Recent articles from professors and PhD students such as Holly Genovese and Professor Mara Casey Tieken speak to the importance of these issues. They highlight how in the popular imagination rural America exists as a white space. This narrative erases the one-fifth of the rural population that is made up of people of color (Tieken, 2017) (Genovese, 2019).

Ultimately, this project aims to create a space for the documentation and preservation of rural marginalized voices, those who Down Home seeks to organize and bring into the fray of fighting for a life with dignity, security, and inclusion. Rural communities have seen drastic rise in crime rates in recent years along with increased job loss and the ravages of the opioid epidemic (Mahtani, 2018). While their suffering is in the headlines, their stories and lived experiences are not often recorded. This project aims to give these communities a space to share their story freely and create a record for generations to come.

Methods

The process of creating this project has been long — the goals have shifted and transformed through iterative conversations with Down Home on their needs, desires, and actual capacity to execute the plan. At the time of the writing of this thesis, Down Home has engaged in the process of moving from being under a fiduciary sponsor to becoming a financially independent organization. This has been a tumultuous time for the organization and as a result they have had limited capacity for creating the front-end website for this project. While the original plan was to develop a frontend and backend for the entire project, this goal was quickly determined to be unrealistic due to lack of capacity once discussions shifted from just myself and Gwen Frisbie-Fulton, their communications director to include members of their technical staff.

It was at this point that we realized that Down Home was in the midst of a storage crisis and that they were trying to find ways of migrating their system to a larger data server. The tech team had promised storage space to a member of Down Home for a different community project and had a number of other technical assistance obligations that whittled down their capacity for new projects. As a result, we shifted the project from the full creation of a front-end and back-end process to the creation of a written training guide to provide Down Home with clear instruction on how to create a front-end

as well the backend processes necessary to ingest files and make them available to the public.

While issues of capacity prevented us from building the project for Down Home, the training guide will allow the organization to build these systems for themselves. As many community-based and grassroots organizations face similar issues in terms of lack of capacity and resource, this guide can be adapted to help document and amplify the voices of the communities they serve.

Building Oral History Guidelines

Once we had figured out the scope of the project, we began to build out the requisite parts for the system to work. The first order of business was creating guidelines for conducting oral histories. There is a wealth of resources available online from sources, including the Smithsonian, various universities, as well as other community archives. The most common form of oral history involves an interviewer and an interviewee. For that format I decided to borrow from the work that was already done and create a similar set of guidelines.

I decided to borrow largely from Martha Ross's six Rs. Martha Ross was a prominent oral historian who is considered by many to be a foundational influence on how oral histories are conducted today (Kuhn , 2013). The six Rs are: research, rapport, restraint, retreat, review, and respect (*How to Do Oral History* 2020). These serve as a mnemonic device towards creating a setting where an oral history can be most fruitful.

One should research likely topics to help build rapport and help jog the interviewee's memory. Building rapport is critical to ensure the interviewee is at ease and feels comfortable sharing. Restraint should be exercised with questions to make sure the story flows chronologically. Retreat simply means to have a planned end to the interview and to keep an eye for when the story seems to be wrapping up. Review is the personal goal of reviewing the interview afterwards and checking to see where the interviewer

could have done better. Finally, this is all done in the spirit of respect; the interviewer needs to be respectful of the people interviewed. This last bit is particularly important to Down Home as an organization that wants to be community-led.

Along with setting some guiding values, I created a step-by-step checklist that guides someone through the process of conducting an oral history. I go over conducting background research, formulating questions, and tips for conducting the actual interview.

I also created some basic documentation for the proper handling of recording tools as well as guidance on email outreach to solicit interviews. In a virtual world due to a global pandemic, I found it necessary to include resources created by oral history associations on how to conduct remote interviews. Ultimately, the consensus seems to be that remote interviews carry a lot of complications and risks ranging from file audio quality to potential rights issues. Remote interviews also make it much harder to build rapport and fully engage in conversation. The biggest concern was that software platforms that would allow for a digital interview such as ZOOM may hold legal rights to the recording (Morgan et al., 2021). There are also concerns around data security and privacy. I ultimately decided that remote interviews carried too many complications to serve as the primary mode for collecting interviews in an effective manner. I created some best-practice provisions around conducting remote interviews centered on verifying that the software provider would not retain or own the information, allowing for a different pacing, and ensuring that the audio capture tools work well.

With the understanding that this project would be a scattered effort with limited funding, I created guidelines that assume that the users will not use actual recorders. The

most common device people own that possess recording capability is their phone. While research suggests that this may introduce some feedback issues, with today's sophisticated smartphones the recordings are of astoundingly good quality.

After creating and reviewing the initial oral history guidelines, we discussed how it was not realistic for Down Home NC to have dedicated interviewers and even more-so for their interviewers to be able to visit all the communities they work with. Down Home NC currently has various chapters across rural North Carolina, and are hoping to continue expanding. Each chapter has a couple of organizers who are the point people for projects and community advocacy. The organizers generally have many responsibilities and Down Home would not be able to ramp up the oral history program as quickly as they would like due to capacity issues if only these organizers conducted the interviews. Down Home as an organization is also a strong supporter of self-advocacy and giving people the tools they need to do self-advocacy work. We decided that we should create a space on the front-facing webpage that would allow community members to submit their own oral histories.

Community oral histories can be understood to sit within a particular continuum. Projects like these range from the expanse of community groups documenting their experiences to scholarly projects started by an academic survey or as part of the oral records of a university (Shopes, 2002). Often, oral histories are focused on one particular aspect or set topic for discussion. We wanted to create a more freeform community oral history. While we would still have focus areas and put out calls for histories relating to

particular topics, we wanted anyone to be able to submit an oral history about something they felt was worth preserving.

This decision introduced a number of complications. Once you shift from interviews conducted by the organization to a free submission structure, you lose a great deal of quality control. We also could not rely on having a guided interviewer to ask for clarification or questions as needed. We ultimately decided to have a list of topics we were collecting and a set of guiding questions for each topic. These would hopefully help prompt memories and experiences and allow community members to see where we were focused, while allowing for suggestions.

The last major consideration of the oral history were the legal forms and problems around privacy. It is standard practice to have a consent form for oral histories. These consent forms often cover giving the organization rights to share and promote the oral history. They can have some restrictions around access, usually seen as a time restriction. Down Home NC decided that it would be beyond their capabilities to actively manage restrictions. The consent forms clearly state this and state that if you consent to an oral history, the file will be available online as soon as possible.

Privacy issues and restrictions surrounding oral histories have been highlighted in the news recently. Even with restrictions, files could be seized as a part of a criminal investigation (*Boston tapes: Q&A on secret Troubles confessions* 2019). Down Home does not plan to interview anyone on any topics that would be considered criminal. However, out of an abundance of caution we decided to make it clear to potential submitters that this information could be used against them. There are also some

complications around interviewing undocumented individuals. We essentially wanted to make sure that our work did not wind-up causing harm to Down Home or its members. We have created disclaimer language to share this information and ensure that people are well informed on the possible risks involved in submitting an oral history to a publicly available online archive.

Creating a Backend System

Once we had created our guidelines for the oral histories and decided what the oral history process would look like, we had the necessary information for creating a backend system. This system included everything from submissions, ingesting into a processing queue, converting formats, and making the information available to the public. The first concern we had was around file formats.

File Formats

As stated earlier, we were working off the assumption that most of our recordings were going to be coming from smartphone devices as most people have one on hand. We have the expectation that as the project started to take off, we could find funding for a few recorders. We do not anticipate this being the case for most volunteers or for those who are self-submitting. The standard file format for iPhones is MP4A which can use lossless or lossy settings. For preservation and audio quality we directed everyone to change the setting to lossless and to have at least 2 GB space set aside on the phone for storage. For Android phones, there are a variety of recorders used depending on the manufacturer and we directed users to a list of acceptable lossless formats or otherwise directed them to try and use a computer.

For computers, we directed users towards an open-source cross-platform software called Audacity (Crook, 2021). We chose this program because of its interoperability and the fact that it has extensive built-in documentation. The program has also existed for many years now and is well supported. We expect that this will continue to be the case and will allow us to continue using this program well into the future. Audacity is used by academic institutions like Guilford College and I used it for an oral history project during my time as a Lowe Fellow at Williams College Special Collections (*Oral History: Best Practices and Procedures: Managing Digital Audio*). The audio formats that are typically recommended for storing oral histories are WAV and AIFF formats as they meet the Library of Congress Sustainability recommendations (*Sustainability of Digital Formats: Planning for Library of Congress Collections*).

The "ideal" audio format according to the Oral History association is BWF, which is a WAV file that includes metadata in its header (*Remote Interviewing Resources*). While this is obviously useful, we could not find a free and intuitive-to-users program that would create this type of file format. We also felt that we were not creating a sophisticated enough system to take advantage of that additional information. WAV is a Windows proprietary file type but ubiquitous on today's systems. AIFF is an Apple proprietary file type that is in a similar situation. We ultimately decided to focus on WAV files as our storage solution simply because Windows computers make up the majority of the market share and assume it will continue to do so into the future.

That does mean that for any audio that comes from a non-WAV format we need to have converters ready. Luckily, converting from one file format to another is easily

done in this day and age. Audacity already possesses the ability to convert any file type it can recognize into a WAV file. If we encounter some other obscure file format that cannot be converted into WAV, we will search for solutions on an ad-hoc basis. After any conversion, we will randomly grab 5 sets of 10 second audio clips from the pre-converted file and then listen to the same set of audio clips in the converted files. If they match, we can assume that the file overall was converted successfully. We felt that this method of quality control was a good balance between time spent and human resources.

Additionally, for every time a file is moved from one location to another in our system, we plan to implement a checksum system to ensure that there was no data corruption. We have instructions for submitters to include a checksum, but decided to not make it a mandatory field on the submission as we did not want to discourage submission from those who are less tech savvy. This creates some concerns about the authenticity of the file, but we felt that the increased level of access outweighed those concerns.

This could introduce some complications if Down Home were to one day partner with a larger organization. Down Home decided that it wanted to support its own architecture because they wanted to host material that could be considered political. They also wanted to avoid any entanglements that would limit their ability to publish material. If Down Home were to join with an archive someday it could introduce complications around preferred file format and the authenticity of the oral histories. We tried to minimize potential complications by storing files in a file format that is typically used by oral history archives. For questions around authenticity, the organization they would be

joining would need to be comfortable with the idea they may not be receiving a 1 to 1 copy or a file of confirmed provenance as user-submitted oral histories are taken on good faith that the information being shared is true.

File name, Metadata Considerations, and Developing a Front-end

Once we had come to a decision about what file formats we would be using, we decided that we had developed enough of a skeleton to start building out what the submission area would look like. This would be the page where we capture most of the metadata we would have about the interview. We decided on a few fields that would capture the information we were interested in. We asked for the following:

- Topic of Oral History
- Interviewee
- Interviewer
- Location
- Date and Time
- Summary/Abstract
- Extra Notes

Oral histories luckily do not tend to carry a lot of metadata that needs to be stored for context. The values we capture compose the standard data gathered for oral histories. The information is also easily slotted into Dublin Core or other common metadata standards. At this stage, we also decided to add to our oral history instructions to include metadata information at the start of the oral history. This ensures that the file would still have the contextual information built in if it were ever to be separated from its metadata.

We created a simple file naming procedure for the files. Standard restrictions around special characters and spaces were included in the instruction language. The

filename had to include information that easily flagged who was speaking and a way to capture multiple files in case the file was too big to be uploaded as a single file. After looking at other naming conventions, it appeared that the interviewee name was the most common human readable designator. We incorporated that into a machine readable file name. We asked that submissions follow a format of:

Topic_LastNameofIntervieweeFirst_NameofInterviewee_Part# - all minor case
Example: healthcare_sanchez_aramis_part1

This system allows us to have a filename that is both easily readable by humans and machines. It also keeps the filename short and makes it so that at a glance you know the basics of the interview.

Finally, we made the consent form a required submission. From there, the plan is to have the submission page send the files to Down Home NC's Google Drive for temporary storage. Uploading to the cloud creates an immediate backup with fixity due to the way that cloud computing works. The submission page would create a new folder with the completed form and the audio files. Then we would run a virus scan to ensure the safety of the files and transfer them into our content management system.

While we have not created this webpage yet due to the pre-described circumstances, we do have a list of requirements in the training guide to ensure that it meets accessibility standards. In particular, we want to ensure that the submission page is screen readable and that it was formatted in such a way that it would not lead to information being hidden. We also wanted to ensure that it was possible to navigate using

only a keyboard (*Top 10 Tips for Making Your Website Accessible*) (*Introduction to Web Accessibility*).

Choosing a Content Management System

We needed to figure out what we were going to use as a content management system. Early in the conversation, we considered Drupal, which is a free open-source CMS. Drupual provided customizability useful for a growing organization, and the communications director had some experience with the platform. Ultimately, we found that Drupal is a very powerful but also very complicated system that required too much effort for an organization of Down Home's size. Drupal's own examples of other users highlighted big industries that likely had much more access to technical resources.

Consequently, we were drawn to Omeka as an alternative. Omeka is also a free open-source CMS that is commonly used by archives. It would allow us to create individual objects that have Dublin Core metadata associated with them. For example, you can attach all of the information we gathered from the submission page as metadata for the file in Omeka. It also has the capability of adding keywords which allows easily implemented search functionality. This combination of factors made it an ideal CMS for a project that is just beginning with limited funding and resources.

We were also encouraged by the existence of online support networks for Omeka. Not only are there Omeka forums, but also many academic institutions have created guides for working with Omeka. The Programming Historian is an open-access peer-

reviewed website that provides beginner instruction in digital tools. Their lesson on how to install Omeka really helped to demystify the process and let us get a test Omeka server running quickly (Reeve, 2016). Their guide on how to create an exhibit also served as a good foundation for Down Home staff (Posner & Brett, 2016). Omeka has built-in accessibility measures which allows us to ensure that our CMS is keeping with Down Home's mission of inclusion.

Finally, the ability to grab Omeka's source code and make modifications allowed us to avoid some concerns regarding lock-in. If for whatever reason Omeka ceased to support the type of operation we want to perform, we could find some way to create the support ourselves. Overall flexibility was one of the major goals for choosing a CMS system.

As a backup option, we also explored the Internet Archive. While the Internet Archive is not a CMS, it is a repository where we could upload the files and have them be publicly findable while retaining most control. As the project proceeds, there may be a shift to hosting the oral histories both on Omeka and on the Internet Archive. Having multiple copies online helps ensure redundancy. Hosting the files on an active repository would also allow the files to live on if Down Home for some reason was unable to continue hosting the materials.

We felt it was important to have a contingency plan in place. As a community organization, Down Home has a very unstable funding situation. While they do not anticipate being in a position where they would have to shutdown the project, it is a possibility. The model we have been developing is partially modeled after the Open

Archival Information Systems. One consideration that stuck with me was the question of how we preserve the materials past the destruction of the archive (*OAIS Reference Model (ISO 14721)*). In a worst-case scenario, the Internet Archive could hold these materials until the end of its existence.

Transcriptions and Using Tags

After choosing a CMS and finding documentation for its use, what was left was finding ways of adding value to the records. An obvious first step would be to provide descriptive tags to the oral histories. The abstracts provide an initial point of description but lack detail. The current planned procedure is to, at the very least, use the topic as a tag. Based on the notes that are provided with the interview, we could also create tags around the specific event. In an ideal situation Down Home staff would be able to listen to each interview. Depending on how many user submissions we receive this may not be feasible. We anticipate that oral histories conducted by Down Home staff will see much more extensive tagging than those from user submissions. This is a labor bottleneck and may be overcome by an increase in volunteers or funding.

Building off tags and the idea of keyword searching lead us to transcripts. By creating a transcript, you make it much easier to do keyword searches for topics without needing someone to manually apply tags. It also allows for much quicker access to the interview and increases the chances someone will use the oral history. Manual transcription is a labor heavy process, so we started looking into potential automation solutions. The majority of which are paid and outside the scope of what we could afford with the resources we had. One potential option was the use of YouTube's automatic

transcripts. While the accuracy of the transcripts is not great, they provide a starting point which can greatly save time in the transcription process. It would, however, also require us to convert the file into a video format. We are not currently considering this option, but it does seem to be the best free option available for automatic transcription.

What we did settle on was a program called oTranscribe which is a free open-source web application that makes manual transcription easier. It puts the audio file and the transcription all on one window and has hotkeys for moving back and forth as well as support for time stamps. The program also automatically saves changes every 5 minutes. The files are stored on local browser cache storage so it cannot be worked on from separate computers unfortunately. The current system would have us assign a specific audio file to a worker/volunteer and they would upload it to Omeka once they were done.

This represents the limit of our additional description at this time. We wanted to keep things fairly lightweight so it would not overwhelm staff/volunteers as they start to use the new system. There are some options available for future expansion which I will detail later in this paper.

Preservation

Preserving these oral histories once they are in the repository was the last section of our backend guide. My recommendation here largely echoes common digital preservation procedures. We established who in the Down Home staff would be responsible for conducting preservation checks. We would be running checksums for the oral histories to ensure that the files were not rotting every 6 months. Once a year we would make additional copies of the oral histories and run checksums again. We felt that this would be sufficient for the pilot portion of the project and that if it became a larger project, they could partner with an organization that had more expertise in preservation.

Concerns

There are a number of concerns that came up during my discussions with the Down Home team. Chief among them was the potential for malicious actors in their oral history submission system. A key part of data security is knowing where your data comes from. Accepting user submissions opens Down Home to the possibility that someone will submit data that could be harmful to the organizations systems. The automatic upload to Google Drive helps to mitigate the situation as Google has anti-virus protections built in. Ultimately the files need to be checked by an anti-virus program before being opened or given to volunteers for processing.

The other large concern was the possibility of a drastic backlog forming. Backlogs seem to be a fact of life at almost every archive these days. The work of processing incoming materials has overwhelmed even well-oiled and staffed university archives. The last thing Down Home wants is to be sitting on a bunch of files that it can’t share. The current set of metadata standards luckily mean that doing basic processing is fairly simple. If a backlog were starting to overwhelm their capacity, I have prepared a list of organizations in the area that do this sort of work that they could partner with.

Additions

There are a couple of additions and expansions that Down Home could take to bolster their program. Some of these have already been mentioned above and I will be expanding on them in this section. These recommendations range from easy to implement to requiring entirely new processes.

OHMS

The first suggestion is for Down Home to incorporate the Oral History Metadata Synchronizer (OHMS) which is a free, open-source software developed by the Louie B. Nunn Center for Oral History at the University of Kentucky (*Tag: OHMS Viewer*). It provides a platform for indexing and time stamping interviews by segment or using the full transcript. It is meant to easily plug into CMS software such as Omeka. It provides an easy-to-use way of doing time-stamp searches and to add metadata to specific portions of an oral history. This helps make tags more accurate and helps users discover relevant topics more easily.

Including Other File Types

Oral histories can be strengthened by the inclusion of supplementary materials like photographs, letters, news articles, or other physical objects that can be digitized. Expanding the number of formats they work with would come with its own ingestion

processes. It would also expand their capacity to include more types of documents into their CMS. This would be a starting point for really expanding their oral history archive into a more general digital archive if they were interested.

Potential for Partnering with Other Organizations

Partnering with another organization could help Down Home have more funding for their oral history or could be used to create a federation of small community archives driven by community organizations. Down Home has already expressed interest in reaching out to organizations they currently partner with and encouraging them to develop their own oral history programs. Alternatively, they could reach out to a more established organization with archival expertise. This would allow them to have access to professional archivists who would be able to help them ramp up their preservation protocols and description.

Creating a physical space

This last suggestion is a radical departure from the previous suggestions. Creating a physical archive would represent a dramatic expansion of the archive and would require far more resources than are available for now. Down Home does currently lease offices that are used as community gathering spaces. It could be possible for them to convert one of these spaces into a physical repository. It would come with a host of preservation concerns and they likely would not be able to follow best practices regarding preservation. Community archives do tend to have a positive effect on a community and serve as sources of pride.

Community Engagement

As mentioned earlier, volunteers can play a critical role in managing incoming interviews and data. However, Down Home could strategically engage members in volunteer opportunities with the archive as a means to strengthen the sense of community and ownership of the archive. Volunteer blasts can serve a double purpose of helping with backlog as well as creating excitement and a sense of collaboration with Down Home's technical team.

Evaluation

Creating an evaluation metric has proven difficult as we have not been able to actually implement the guide. Down Home NC has communicated that they feel the guide meets their needs and provides options for future expansion if able. They have also told me that they are already incorporating some of our oral history guidelines into their organizing work. Ultimately any serious evaluation will have to wait for Down Home to implement the guide and see how it holds up. I have committed to aiding them through the process and iterating the guide, as necessary.

I will consider this project a full success if it allows Down Home to successfully start their oral history archive. Ideally the guide will serve to answer any and all questions they might have for the process. I will consider it a tremendous success if other organizations are also able to use it to build their own systems.

Conclusion

This ultimately was a continuously iterative process that has led me to have significantly more experience in project design. Between the Down Home NC staff and me, we have created a comprehensive training guide that we feel will fully serve a small organization with limited resources that aims to start an oral history archive, guiding them from start to finish. We provide multiple potential options and link to other guides and resources that give more in-depth information regarding specialized topics. I look forward to seeing how the guide expands and where it spreads.

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Appendix A. Oral History Training Guide

Oral History Training Guide

By Aramis Sanchez

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This guide is intended to help small community-based organizations develop a digital archive with a focus on oral history. A small organization is one with five to fifteen employees. Community-based organizations come in all shapes and sizes, but this guide is aimed toward organizations that are built by the community they are based in and are not backed by a more powerful entity that provides a stable access to funding, but have some access to resources, whether in the former of employees, extremely dedicated volunteers, or a physical space. This specificity is important to understand the framework for the recommendations made in this guide. It is my hope that others can utilize this guide and find use in at least some of its components depending on the specific organization. This guide was written as a part of a Master's thesis project for Down Home NC, a community based organization that works to unite the power and raise the voices of working people in small-town and rural North Carolina to shape a democracy that serves everyone. This guide was also created in the midst of the COVID-19 pandemic, and recommendations will reflect the considerations that come with these unprecedented times.

Why an archive?

Community archives are becoming increasingly popular in the United States. Communities across the country are a source for a wealth of history worth preserving and stories worth telling. Ultimately, a community archive is a site of community power. It is a place for people to come together and share their lived experiences. In a society where we are increasingly disconnected from our neighbors, community archives are a site where we can come together and share in each other's stories while building a record for those yet to come.

Why A Digital Archive?

When people think of archives, the image is typically either a dusty room full of boxes or a museum with displayed artifacts. If you want to have an archive where you store physical materials -- such as photographs, newspapers, and letters -- and make them available for others to use, you need to have space to not only store materials, but also to allow people to come in and peruse them. Assuming you are not letting people freely waltz into your archival storage, you also need staff to help community members access the archive. Staff also need to be trained in proper preservation techniques and procedures to ensure materials last. For an organization with limited funding, a physical archive may be biting off more than you can chew.

Alternatively, a digital archive is more flexible when it comes to the resources and staffing it needs for maintenance. You will need storage space and a digital repository for the digital materials you receive, and staff with some level of knowledge on databases and coding. That’s all you really need to hit the ground running. Digital archives give

smaller organizations the ability to build, preserve, and share community knowledge and histories.

Why Oral Histories?

Oral histories have the potential to democratize archives and make contributing accessible to those who do not have the access to or ability to create traditional records. Storytelling is an innate human need; we can channel that needs towards building community and organizing for positive change. By reaching out to our neighbors and hearing their stories, we can connect and recognize the humanity in each other. Oral histories allow all voices to be heard, and provide an enduring recording of communities in that particular moment.

Planning Oral Histories

Whether you want to interview a small group of people or collect stories from across the nation, it is important to spend some time thinking about what you want to accomplish. Oral histories can serve as a great organizing and community building opportunity as you are asking others to share their stories. This may be the first time that someone has been asked to think of themselves as a part of history, and recognized the significance of their story. I strongly encourage your organization to sit down and develop a mission statement that guides your oral history process. Your organization's mission statement can be used as a jumping off point for this process. Intentionality is important and will help you develop the values you will carry forward in this work. You can use the following questions to help guide your discussion:

- What are you trying to accomplish?

- What questions are you interested in asking?
- How are you going to reach out to potential interviewees?
- How are you going to responsibly share these stories?

Martha Ross was a prominent oral historian who is considered by many to be a foundational influence on how oral histories are conducted today. She was a teacher and civil rights activist and I find her story similar to the story of many community activists today. She developed a system for interviewing centered around the six Rs:research, rapport, restraint, retreat, review, and respect.

1. ***Research:*** It helps to know a little bit about the person you are talking to. This can help to formulate questions and also helps build rapport. Depending on the topic, the information you have can be used to help flesh out an interview by asking about particular places, names, or dates.
2. ***Rapport:*** Rapport is building a good relationship with the interviewee. A pre-interview conversation to go over the interview and their roles and rights can go a long way toward making someone feel comfortable.
3. ***Restraint:*** You are asking someone to be vulnerable. Try your best to respect that. Be a good listener. Focus on them and try to minimize tinkering with the equipment. Ask open ended questions but don't be afraid to follow up on an interesting tid-bit. Gently encourage them to stick to chronological order. Ask for clarification if you heard something that doesn't sound quite right.Cultivate an environment where the person you are interviewing feels comfortable answering honestly.

4. ***Retreat:*** Have an exit plan. It's helpful to close the interview with a wrap up question. It could be something along the lines of asking how someone's experience with the interview has been. You don't want to abruptly stop someone. Try to be reasonable about time and don't keep someone to the point that they want to leave.
5. ***Review:*** This one is more about you. You always have room to grow in this work. Take a bit of time after your interview and assess your work in the interview. Think about what you could have done better and if you want to talk to this person again. They may have more to share.
6. ***Respect:*** Respect is the basis of an oral interview. Have respect and empathy for the interviewee, their story, and how they choose to share it.

How To Reach Out To Potential Interviewees

You likely already know some folks that you would like to interview. Outside of the virtual world during a pandemic, the most effective way to move forward to simply ask. Provide background around why to want to interview them and what the process entails. Given current circumstances, it's probably better to send an email. You can build a list of potential interviewees by asking your community members. You will find this to be the most effective tactic for finding more people to talk to. Ideally, you can have community members reach out to people they know instead of cold emailing. If you are reaching out to someone that you haven't talked to, share a bit about yourself and the organization. Let's say that you wanted to ask someone about an oil spill that happened near the community. A sample email could look like:

Hello X,

My name is Aramis Sanchez and I'm a member with Down Home NC. Your friend X told us that you took part in the oil spill clean up in 2018. We are collecting community stories about that event and putting them online in an archive. We want to preserve the story of our community response. Would you be open to having a recorded interview with us that we can share?

Thank you for your time,
Aramis Sanchez

Conducting the Actual Interview

In many ways, this is just another conversation. You want this to flow like you are listening to an old friend sharing a story. Below you will find a step-by-step checklist to prepare you for the interview. There are a couple of things you can do to help build this atmosphere while not affecting the quality of the audio:

- When you sense a lull or silence in the interview, don't jump immediately to fill the silence. Wait ten seconds before prompting another question. Often, before the ten seconds are over, the interviewee will fill the silence themselves, leading to interesting stories that might not have come up otherwise.
- Don't forget to use body language. A headnod to show you are listening shows engagement while avoiding verbal tics we use to show we are listening. Use eye contact and facial expressions to encourage the interviewee to keep going.
- Neutral, open-ended questions are key to making sure the conversation flows. The last thing you want is to reach an awkward pause
- Ask questions that your interviewee can answer from first-hand knowledge. Keep the conversation focused on personal experiences.

- If they use acronyms or technical terms, ask the interviewee to elaborate. You may know what they are talking about but the person who listens to the interview may not.

Recording Tools and Proper Handling

You need to have something to record your oral histories on. This is a place where funding can become an issue. The gold standard for oral histories are TASCAM and MARANTZ recorders. These recorders can cost anywhere from $250 to $600. Budget options still start around $60 at the lowest. Depending on how many people you plan to have as interviewers, this can be quite the sticker shock. While best practice would have you spring for a recorder, I have found that most of us already possess an excellent recorder that we carry with us every day. Modern smartphones have recording capabilities and work very well. While they don't provide all the features of an actual recorder, they can be used until you find sufficient funding.

Best practice for all of these tools are similar.

- Make sure to test your recording device before starting to check for issues.
- Ensure your device is fully charged. If you are using a recorder, ensure to bring backup batteries.
- Ensure that the recorder is set to the correct file format before recording (This is covered later in the guide).
- Turn off all non-essential electronics that are not being used in the interview to avoid feedback and distractions.

- Lay the recording device flat on a surface between you and the interviewee. This helps prevent static and noise from moving the recorder.

Conducting Remote Interviews

Covid-19 has made conducting in-person interviews difficult. It is my dearest hope that by the time you implement this guide, Covid-19 will be vanquished. If it hasn't, you may need to consider doing remote interviews. This introduces its own set of complications. It can be difficult to build the same type of rapport from a distance, you can no longer communicate nonverbally, and you are much more likely to run into awkward pauses. Interviews conducted using services like Zoom tend to be of poor audio quality. There are also issues around the legal rights as well as creating a process for people to sign the release form.

If you decide to conduct a remote interview make sure that the web service you are using doesn't claim rights over audio created using their system. For capturing remote signatures consider using a program like Docusign which has become more standardized during this time. For much more extensive documentation you can look to the Oral History Society which has developed an extensive guide on conducting remote interviews.

Self-Conducted Interviews

You may want to allow individuals to submit self-conducted interviews for your oral history. This makes gathering stories easier but may come with quality issues. Having a two person format helps keep the flow of the conversation going and allows for someone to ask questions at a point where the speaker is being unclear. I would

recommend creating a list of questions for people to use as a guiding focus.

There are also security concerns for taking files from unknown sources. Be sure to run any outside materials through an anti-virus before opening. Listen to the oral history to ensure it doesn't possess harmful material such as slurs or other malicious things. While I would hope no one would send something hateful, In this day and age you may become the target of trolls. Exercise due caution.

Who Controls These Interviews Legally?

The interviewee and the interviewer both own their own words on the interview. An oral history is an original document created by those in the interview. It is subject to copyright law and may not be used unless both individuals give their permission.

How Do I Get Permission To Share An Interview?

You will need to ask everyone who is in the recording to sign a release form/consent form giving permission to share the material. There are a couple of different formats for this. Some organizations have people sign over their copyright interest. Others simply get copyright permission. This guide does not provide legal advice; your organization can look at other consent forms and draft one that works for you. Organizations generally want to make sure that their release forms provide permission to use the interview information for publication, public programming or other public dissemination.

Some examples are hyperlinked below. This is not an exhaustive list and you can find many more examples online.

University of Columbia Oral History Agreement

California State University

American Library Association LIRT

Ethics Of Conducting Interviews

It is imperative that both the interviewer and interviewee understand their rights in an oral history interview, as well as what the interview plans to do with the interview. This guide assumes these oral histories are being gathered for not-for-profit reasons. If you are planning to commercialize these oral histories in any way, consider how are you going to compensate those involved. Make sure your interviewee is comfortable with the information you are sharing and the way it will be shared.

Recently, there was news coverage on oral histories that were used in a court case (BBC News). While it is not the norm for someone to share such sensitive information, you want to make sure people are comfortable with what they are sharing. Exercise an abundance of care if you are interviewing vulnerable communities, such as incarcerated people or undocumented people. Look online for specific guidance and consider reaching out to academic professionals who may know the specifics of how to properly conduct such interviews.

Interview readiness check-list

- ❏ Do background research on your interviewee.
- ❏ Formulate questions based on your mission statement and your background research.

- ❑ Schedule the interview. Consider the location of the interview--do you have access to a quiet room with no distractions? If you are conducting the interview in the interviewee's home, make sure to ask if the home will be free of distractions.
- ❑ Ensure your recording device is fully charged and working properly. Bring spare batteries if using a recorder.
- ❑ Bring a notebook to take notes on the interview, and help you jot down follow-up questions.
- ❑ Give the interviewee any legal documents they need to sign. Make sure they have filled out any information form you need with important information (name, address, etc.,)
- ❑ Conduct the interview. Assess whether you will need a follow-up interview.
- ❑ Properly file and prepare the audio to share and preserve.

Self-Conducted Interview Checklist

- ❑ Make sure your recording device is properly charged. Make sure you have backup batteries if you are using a recorder.
- ❑ Fill out any forms or waivers that are required by the organization collecting interviews.
- ❑ Have the questions the organization is asking on hand to help guide the interview.
- ❑ Make sure you are in a quiet room with no distractions when conducting your interview.
- ❑ Once you have finished the interview, check the audio to make sure it is properly recorded, and upload!

Archiving Oral Histories

Metadata

Metadata is information that describes another set of information. It is used to help catalogue information and to give it context. In this section, we will talk about what types of metadata you want to gather with your oral histories. We are going to be focused on descriptive metadata. There are other types of metadata such as security metadata and use metadata. Those aren't particularly important to our purposes, so let's keep it simple. Descriptive metadata is made up of things like interview title, location of the interview, names of interviewee and interviewer, date of the interviews particular keywords, and other such things. It's basically all the information you would need to be able to contextualize the oral history for someone. Spend some time thinking about what type of information you would need to describe an oral history. You will be using it to organize your interviews as you process, upload, and preserve them. It is also recommended to write a brief abstract that will give a user basic information about the interview and what is covered within.

I would encourage you to create a form that someone can fill out with this information for your records. The metadata I described above is a good place to start and for some organizations that may be all that they need. These are the standard descriptive metadata that are used universally for all oral histories. It is also common practice to list these things at the start of any oral history, as was described in the checklist above. This helps to make sure that even if you lose the form, you still have the basic information you need to preserve these oral histories.

This is a good sample Metadata Form that is available for use under a Creative Commons License comes from the University of Kenyon. It covers the basic information you would want to gather and leaves space for notes. Feel free to use this one or to use it as a template for building your own.

There are some common metadata standards you may run into as you try to preserve your oral histories. The most common one you will encounter is Dublin Core. You won't need in-depth knowledge of any of the standards, but I do want to note their existence in case you come across them when looking at additional resources. All they do is provide a standardized way for different institutions to share metadata. This helps interoperability and makes sharing between organizations easier. Consider incorporating Dublin Core as a metadata standard for your own system.

File Formats

There are dozens of file formats that we come across on a daily basis. Every once in a while you may come across a new one. We want to be able to ensure that whatever file format we use today is still going to be used decades into the future. We also want to ensure that the file format we use captures all of the data we need. When you make an audio file, depending on the format, you may not be saving everything. For audio files, there is lossless and lossy compression. Lossy compression gets rid of some of the data it thinks is unimportant to shrink the file size. Lossless keeps everything, but this leads to a larger file size.

We want to use a file format that we believe is going to last forever and that uses lossless compression. This ensures that we have the most authentic copy of the interview

we can create and that we will have to do minimal work to ensure compatibility for usage. There are a couple of different options here. There are two general file formats you can go with. WAV is a Windows proprietary file type but ubiquitous on today's systems. AIFF is an Apple proprietary file type that is in a similar situation. Users on any operating system are able to use these files types with the correct software. These file formats are well supported and considered the gold standard for audio preservation. You can choose either of these but it's worth considering that Windows PCs historically make up the majority of market share.

Note: For WAV there is an additional consideration. There is a specific type of WAV called Broadcast WAV. This file format carries a space to hold metadata information in the header of the file. This means that someone could open the file on a computer and see on the screen metadata information. While this is technically the ideal format for audio preservation, I have not found a tool that allows us to easily access and use those files. As such I will not be covering their handling.

What Happens if I Get a File in the Wrong Format?

That's ok. We just need to convert it using a software tool into the format you want. Ideally the file is another lossless format so you can get it to a final file type without losing any data. We will review these tools in the next section.

File Editing and Converting

Once you've chosen a file format, you need to find a tool that lets you handle those files. The software you use should allow you to listen to the audio and convert the

format if necessary. There are a couple of options available to you. I'm going to list two that I've seen recommended below.

I like a program called Audacity. It is a tool that I have personally used while archiving oral histories. It is an open source, cross platform audio software. This means that anyone can download. It's been around for many years now and still has a very active community. There are extensive how-tos and FAQs to help users figure out how to use the program to its fullest potential. It supports most types of file formats out of the box and is able to convert them into WAV and AIFF files.

Ocenaudio is another tool that meets the same requirements. It's also an open source, cross platform audio software. It is still being actively supported and is being partially developed by the Federal University of Santa Catarina in Brazil. While the ocenaudio website does not host much documentation as simple google search will lead you to many tutorials on using the software. It shares the file type compatibility and conversion ability of Audacity.

When you convert a file, you want to make sure nothing went wrong in the process. You want to make sure that there aren't any weird alterations in the audio. You could listen to the whole thing, but that takes a lot of time. I would recommend taking 5 sets of 10 second audio clips from the pre-converted file and then listen to the same set of audio clips in the converted files. If they match, we can assume that the file overall was converted successfully.

File Names

It is important to choose a file naming convention and to stick to that throughout your entire system. Include the same information in the same order. You want to incorporate the metadata you gathered into the file name. Some common filename structures you may want to include are names of the creators, the subject of the interview, date of the interview, and a way to distinguish if a file is part of a series. File Names can be machine readable and human readable. Machine readable means that a computer can easily parse and distinguish file names. Human readable means that it is simple and intuitive for a human to read it.

There are a few general guidelines to use if you want to make your files machine readable. Don't use spaces, punctuation, or capital letters. Avoid special characters like $, @, %, #, &,*, (,), !, etc. Use _ instead of spaces. For human readability all you need to do is make sure it's easy for a human to understand it.

This is an example of a file naming format you may want to use:

Topic_LastNameofInterviewee FirstNameofInterviewee_Part# or Topic_LastNameofInterviewee_FirstNameofInterviewee_Part#

Example: Healthcare_SanchezAramis_Part1 or healthcare_sanchez_aramis_part1

Note that in this example the first one isn't machine readable while the second one is. It's up to you to figure out what you would prefer. Machine readability can come in useful as your collection grows. It is advised that you try and make your file names both machine readable and human readable if possible.

Creating A Submission Area

You need to have a space for your interviewers to submit their oral histories to you. This can be as simple as having a central computer where they upload the file using a cable or usb. You can also build a web portal where people can submit files and documents to you and have them automatically go to a cloud storage provider. At the end of the day, you need to create a system for how files are going to come into your system.

I would recommend using cloud storage when possible. Cloud storage is automatically backed-up in various places and checked for fixity, which minimizes chances for corruption compared to storing them on a local device. It also allows everyone working with the files to have easy access. Services such as Google Drive, Dropbox, and other free cloud storage sites allow for easy access. Most have limited spatial capacity unless you pay for more storage. If you do decide to save the files to local drives save them in at least two different drives. This helps to ensure that if one drives fails, you still have a copy. These backup files are important in case something goes wrong during the editing, upload, or access process. Live by the rule that if you only have one copy, you have no copies. I would recommend using local storage only in the short term and transferring to the cloud whenever possible.

Content Management System (CMS) or Institutional Repository (IR)

Now, you need to figure out how you are going to share your oral histories with the world. You can either manage your own content management system or partner with an institutional repository. A CMS allows you to present your oral histories alongside any description/context you attach to them. You would be running them yourself and have the

freedom to do whatever you want to do on your own platform. The limitation is that you are on the hook for all maintenance and content management systems are not intended to be permanent. They don't keep up with changing technologies by themselves or the way file formats might change. For example, there were content management systems based on Flash. Flash has since been discontinued and anyone using those systems would need to migrate to a new CMS in order to stay relevant.

An Institutional Repository (IR) is an online archive for collecting, accessing, and preserving the contents of a particular institution. Many colleges and universities have them and there are some "freelance" institutional repositories as well.

There are a couple of advantages to partnering with an IR. Your collection will show up within the context of a larger insulation which helps with findability. If you partner with an academic IR, your oral histories can be accepted as authoritative, academic sources. Many IRs will handle uploading for you or at least provide technical assistance. They are also maintained long-term by the institution, so you won't have to worry about maintaining a website, or making sure your files remain accessible. The downside mainly comes from a loss of control. IRs may impose a standard onto your work or require that only certain subjects get talked about. You also won't have control over how your content is presented.

If you want to retain control, one solution can be to have your own CMS system but to partner with a repository for long-term preservation.

Choosing a Content Management System

There are a lot of options for maintaining your own content management system. Below are some free options that you can use and a brief descriptor. All of these options are open source and you can freely amend them as you wish.

Wordpress - You've likely used many websites based on Wordpress. It's the go-to for many people building a new website. It provides a lot of functionality but isn't built with archives in mind so you may have to manually code some features.

Drupal - The most powerful of these systems but also the most complex. I've seen some beautiful websites based on Drupal and it possesses a lot of modularity. It requires substantial tech experience to harness its true potential.

ArchivesSpace- A relatively new CMS that is quickly becoming the standard across archives. It may have more functionality than you strictly need. It's very actively being updated and documentation is still a little spotty.

Omeka- Omeka is a very commonly used CMS system and is particularly notable for its easy inclusion of metadata and the ability to easily create exhibits for different types of data.

Any of these can serve as your new CMS system, or if you already have one of these, you can expand it to incorporate your new oral history program. I would personally recommend Omeka as I believe it has the perfect mix of ease of use and features.

Choosing an Institutional Repository

There isn't an easy guide to choosing an IR. You are going to want to reach out to local colleges and universities and see they are interested in partnering with you. Make sure to ask about what their file format and naming standards are and any other

requirements they might have for your files. You will need to convert/rename files before sending them if they have different requirements.

An alternative option is to use a web archiving like the Internet Archive. The Internet archive is a non-profit that exists to store and share files for the public good. Some colleges already base their IRs off the Internet Archive. They can serve as permanent digital storage and an additional point of access for users. Once it's uploaded it is posted automatically and you can apply some description to the file.

Transcriptions and Tagging

You are going to want to add some description on top of the abstract and the basic metadata you gathered at the start of the interview. Tags are a great way of helping users discover the oral histories. To keep an example from above, if you were to collect stories from various people doing disaster recovery work after an oil spill, some might mention a particular place or subject. This may not show up in the abstract, but you could manually apply a tag to the oral histories that mention similar things. For example, a cluster of people may have talked about bird conservation efforts. Tagging provides additional findability and helps to create groups you can create sub-groups around.

Transcription is another additional descriptive tool that can massively boost the use of oral histories. Transcription is a time intensive process and you can expect to take four to six times the length of the oral history to transcribe it. There are paid processes but they tend to be pricey. The cheapest paid services use AI and tend to have a self-reported accuracy rating in the low seventies. One free automatic option is Youtube. They do automatic transcriptions that you can then go back and edit. They have been developing their AI for a while and it tends to be fairly accurate from personal

experience. A guide for using Youtube for transcription can be found from the Oral History for Liberal Arts Association. Note that they require you to upload a video file format so you will need to convert the oral history to a video file to use this option.

For manual transcription, there is a handy web-based tool called oTranscribe which is a free open-source web application that makes manual transcription easier. It puts the audio file and the transcription all on one window and has hotkeys for moving back and forth as well as support for time stamps. The program also automatically saves changes every 5 minutes. The files are stored on local browser cache storage so it cannot be worked on from separate computers unfortunately.

Preservation

There are a couple of preservation concerns you want to keep in mind throughout this process and for maintaining the oral histories afterwards. All digital objects are going through a process called bit rot. Digital materials will, over time, decay and become unusable. It is caused by wear and tear on the section of memory that holds the file as it is used. This is a very slow process but the information that is lost often cannot be regained. We need to guard against bit rot because we want out files to last forever. There are a couple of ways to check if bit rot has happened and also ways to prevent bit rot.

The main detection you will use involves checksums. A checksum is a sequence of numbers and letters used to check data for errors. If you know the checksum or your original file, you can confirm that the copy you have is identical. If bit rot has occurred, the checksums won't line up. You can find some more information checksums in this

article by How-To Geek. You would ideally get a checksum when you first create the file and then do a new one each time you make a new copy.

There are a couple of ways to prevent bit rot. When you make a new copy of the file, it is stored in a new location. Saving a file as new in a different location helps prevent bit rot. Additionally, saving the files on the cloud helps prevent bit-rot issues. Cloud based storage usually keeps multiple copies of the same information and moves around data pretty commonly within its data centers.

There are more specialized solutions for bit rot but they tend to require a good deal of training and are usually only used by serious researchers and archivists. I would encourage you to partner with an institutional repository or archivist to aid you with more complicated preservation concerns.

Accessibility Tips

You want to make sure your files are accessible by everyone. Designing with accessibility in mind is simply good practice. The Web Accessibility Initiative is an organization that aims to make the internet accessible to people with disabilities. They maintain extensive documentation on how to make your websites accessible to all. I strongly recommend looking at their website and incorporating their advice into every website you make.

In general, you want to make sure that all the information you have on your website is findable and easily understandable by a screen reader. Try and make your website navigable by keyboard to accommodate those who struggle with the fine control to use mice. Use alt image text to describe pictures.

Conclusion

I hope that you've found this guide helpful. There are a wealth of resources online that you can find for any of these subjects. Don't be afraid to look for other resources. You can also contact me personally at aramissanchez0603@gmail.com. I can't promise that I will instantly respond, but I am committed to creating more sites for community archiving and I feel that this is an important step towards developing a culture that celebrates and brings together communities.